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MARKET REVIEW

Sales of sugar by primary distributors for consumption in the continental United States continue -- as they have all year -- to compare well with last year and the record deliveries of 1970. Through May 13, 1972 preliminary reports indicate 3,798,000 short tons, raw value of sugar were delivered. This compares with 3,667,000 tons delivered during that period of 1971 and 3,789,000 tons during the same period of 1970. Constructive deliveries, i.e., sugar sold and charged to quotas in December but physically delivered in January and February of the following year amounted to 87,000 tons in 1971, 161,000 tons in 1970 and 40,000 tons in 1969. Physical deliveries through May 13, 1972, therefore, totaled 3,885,000 tons. Physical deliveries amounted to 3,828,000 tons and 3,829,000 tons, respectively, during those periods of 1971 and 1970.

Primary distributors' inventories of raw and refined sugar as of April 29, 1972 totaled 2,847,000 short tons raw value, according to preliminary reports. This was 51,000 tons less than a month earlier but about 188,000 tons more than at the end of April a year ago. Beet processors' stocks of 1,390,000 tons were down 91,000 tons from the end of March and down 35,000 tons from the end of April of last year. Cane sugar refiners' stocks of raw and refined sugar were reported as 1,105,000 tons, up about 98,000 tons from a month earlier and up 240,000 tons from the end of April a year ago.

Regionally, primary distributors reported deliveries of refined sugar by States of destination for the period January-March 1972 were about 5.4 percent above January-March 1971 deliveries. Increases occurred in all of the five regions. Reported deliveries were up 7.2 percent in the West, 6.1 percent in the North Central region, 5.2 percent in the South, 3.9 percent in the mid-Atlantic and 3.8 percent in the New England region.

Individually, 36 States received more sugar during the first three months of 1972, as compared with those months of 1971, 12 states received less while two States received about the same quantities. There were nine States with reported increases of more than 100,000 hundredweight--Ohio had the largest increase, 462,000 hundredweight, followed by Illinois with 283,000 hundredweight and Michigan with 279,000 hundredweight. Of those States where reported deliveries were smaller during the first three months of 1972, Iowa had the largest decrease, 159,000 hundredweight, followed by New York which was down 94,000 hundredweight and Maryland down 90,000 hundredweight.

Effective at opening of business May 2, 1972, a cane sugar refiner in the Southeast announced a reduction of .15 cent per pound in the quoted wholesale price for both industrial grades and grocery items of refined sugar. Other sellers in the region followed by announcing that their prices would be competitive.

Shown below are the price quotations for refined sugar sold at wholesale in 100 pound paper bags and in bulk, by sales territories as of mid-May.

PRICE QUOTATION IN CENTS PER POUND

	<u>Hundredweight bags</u>	<u>Bulk dry</u>
Northeast	13.20	12.70/12.80
Southeast	12.75/12.90	12.50/12.65
Gulf	12.20	11.60/12.00
Chicago-west	11.90/12.60	11.50/11.75
Intermountain Northwest	11.65	11.40
Pacific Coast	11.70	11.55

Actual prices in some cases differ substantially from quotations. During the post-freeze economic stabilization period (Phase II), increases in ceiling prices of individual sellers of refined sugar must conform to the procedural requirements prescribed by the Cost of Living Council.

The U. S. average retail price for refined sugar sold in 5-pound paper bags during April 1972 was 13.94 cents per pound up from 13.90 cents in March and 13.54 cents in April of last year, an increase of 3.0 percent for the 12-month period.

The New York Coffee and Sugar Exchange' spot quotation for raw sugar duty paid and delivered to New York averaged 8.89 cents per pound during April, down from 9.16 cents in March (the highest monthly average quotation since January 1964 when it was 9.29 cents per pound) but up from 8.29 cents in April of last year. The weakening trend in the quotation which had begun about mid-March after the quotation had been 9.20 cents per pound for the six market days of March 9-16 bottomed out at 8.70 cents per pound for the period April 25 through May 9. On May 10 the quotation rose to 8.85 cents per pound and for the period May 1-23 has averaged 8.79 cents compared with 8.46 cents per pound during that period of last year.

Production of cane sugar in Hawaii through April 29, 1972, amounted to 243,623 tons 96⁰ basis. Through May 1 of last year, 263,679 tons had been produced.

Cane sugar production in Puerto Rico through May 14, 1972 amounted to 224,980 tons 96⁰ basis compared with 251,215 tons produced through May 16, 1971. The yield of sugar per ton of cane in 1972 has averaged 7.003 percent. The average yield was 7.357 percent through the same period last year.

The spot quotation for World bulk sugar f.o.b. and stowed at greater Caribbean ports, including Brazil (No. 11 Contract of the New York Coffee and Sugar Exchange), averaged 7.29 cents per pound during April, down from 8.74 cents in March but up from 4.61 cents in April of last year.

The World price quotation in late April began to strengthen, rising from 7.15 cents on April 27 to 7.25 cents on April 28 and to 7.50 cents for the period May 1-3. On May 4 the quotation declined to 7.30 cents and continued to weaken, falling to 6.40 cents on May 12 and 15, the lowest since Dec. 17, 1971 when it was 6.30 cents per pound. On May 16 the quotation increased to 6.50 cents, to 6.60 cents on May 17 and to 6.90 cents on May 19. On May 23, World bulk sugar was quoted at 7.25 cents per pound and for the period May 1-23 averaged 6.98 cents compared with 4.38 cents during that period of last year.

INTERNATIONAL SUGAR ORGANIZATION COMMITTEE MEETINGS SCHEDULED

Meetings of the International Sugar Organization began in London the week of May 15, 1972.

The Statistical Committee was scheduled to meet during the period May 15th through the 17th; the Executive Committee on May 18th through the 22nd and the Sugar Consumption Committee on May 23rd with the full Council meeting during the period May 24-26.

The sugar supply and demand situation for 1972 will be reassessed and there will be preliminary discussions in connection with continuation of the International Sugar Agreement now scheduled to expire at the end of 1973.

REFINED SUGAR MOVEMENT WITHIN AND
AMONG MARKETING TERRITORIES

By Harry A. Sullivan

A previous study of the movement of refined sugar within and among marketing territories (price quotation regions) ^{1/} for the 1955-58 period was reported in Sugar Reports 95, pp. 9-15. This article updates that study by analyzing refined sugar movement for 1970 and comparing 1970 with 1958.

The system for marketing refined sugar in the United States evolved as a result of product type and location economics. Refined sugar as marketed in large volume in the United States is a standardized commodity of great uniformity of quality regardless of who refines it. It is bulky and transportation costs are the key consideration in production facility location. The domestic production of raw materials (sugarcane and sugarbeets) is limited by geographical considerations (climate and soil) and economic considerations (competitive alternative crops).

The marketing system for the domestic sugar industry is thus characterized by a relatively small number of major supply centers serving relatively large distribution areas. ^{2/} The supply centers are composed of (1) raw cane sugar refineries located at coastal ports and in the domestic sugar cane producing areas and (2) clusters of sugarbeet factories surrounded by sugarbeet acreage (along with two raw sugar cane refineries) located inland. There are 22 sugar cane refineries located at nine coastal sites ranging from Boston to San Francisco. The Northeastern coast with its dense population has the largest number, a total of nine -- two at Boston, four at New York, two at Philadelphia and one at Baltimore. The Southeast is serviced by a refinery at Savannah, Georgia and three in the Florida sugar cane production area. The Gulf region has four refineries in or near New Orleans and one at Sugar Land, Texas. The West Coast's only refinery is on San Francisco Bay. Sugar cane processing factories (raw sugar houses) and several associated refineries are located in the sugar cane producing areas in order to minimize raw material transportation costs.

Sugarbeet production occurs in areas where sugarbeets competed successfully with other crops for acreage. Sugarbeet factories were located within or adjacent to such acreages in order to minimize raw material transportation costs -- sugarbeets weigh about eight times as much as the sugar produced from them. Most of the sugarbeet producing localities are West of the Mississippi. California produces more than any other state, it has 10 factories and sugarbeets are planted in nearly every county. Nearby, Arizona has a factory at Chandler with associated acreage.

One of the sugar beet localities in the Intermountain region centers around Southern Idaho but runs from Central Washington through Eastern Oregon down through Idaho to Central Utah. There are eight sugarbeet factories. Another important Intermountain locality runs from Eastern and Central Montana through Northern and Eastern Wyoming and includes the Colorado, Western Nebraska and Western Kansas tri-State area. Fourteen sugarbeet factories are clustered in Colorado-Nebraska, - Wyoming border locality with seven others scattered over wide areas of Montana, Wyoming, Colorado and Kansas. The Red River Valley of North Dakota-Minnesota has four sugarbeet factories and there is one in Northern Iowa. Eastern Michigan-Northwestern Ohio has eight factories and there is also one in the panhandle of Texas.

^{1/} "Development in Refined Sugar Pricing," William N. Garrott, Sugar Reports 230, July, 1971

^{2/} Ibid

The United States is divided into seven refined sugar marketing territories, roughly corresponding in geographic location to the names applied to each, i.e. the Northeast, Southeast, Gulf, Chicago-West, Southwest, Intermountain Northwest and Lower Pacific. These areas are depicted in the chart on page * They evolved as a result of the refined sugar marketing firms' quest for the greatest volume of marketings at the lowest possible transportation costs. Because of the product standardization and uniformity, refined sugar prices at the same time in a given market will vary little. The seller most advantageously located and usually with the largest share of the market tends to set the price in a given area. He establishes his delivered price to a buyer on his optimum f.o.b. price profitwise plus the cost of transporting sugar to the buyer. Other sellers, if they wish to compete, must meet this price regardless of their own location. The location of the principal seller in a region then becomes the "basing point" 3/ for sugar sales in the territory.

The basing point system of marketing sugar developed years ago because large cane sugar refineries found it economical to locate their production facilities at ports of entry in, or adjacent to, densely populated areas. This gave them easy access to offshore raw cane sugar from which approximately three-fifths of the refined sugar sold in the United States is manufactured. Because they became the principal sellers of sugar in each of the territories where they were located, those cane sugar refineries established the basing points for sugar sales.

The initial source of sugar supplies in the United States was offshore raw cane sugar. This led to a marketing system for refined sugar based on cane sugar refineries well established at strategic locations long before the beet sugar industry developed in this country. The bulk of beet sugar production represents a marketing situation that is the reverse of that of the cane sugar refineries. The production of beet sugar is widely scattered over sparsely populated regions and much of the sugar must be marketed in competition with cane sugar refineries that are more advantageously located marketwise.

Refined sugar movement in 1970

Not unexpectedly, the single most influential factor determining the volume of distribution of refined sugar within a territory is the size of the population residing there as shown by the following table for 1970:

Territory	Percent of U.S. population	Percent of U.S. refined sugar distribution delivered within the territory	Percent of U.S. refined sugar distribution originating from the territory	
		Percent	Rank	
Northeast	39.7	37.9	34.9	(1)
Chicago-West	19.9	25.4	13.4	(4)
Lower Pacific	10.7	11.3	14.9	(3)
Southeast	9.4	8.8	5.8	(6)
Gulf	9.1	7.5	18.9	(2)
Southwest	7.3	5.9	4.4	(7)
Intermountain-Northwest	3.8	3.2	7.7	(5)
U.S.	100.0	100.0		

Although the proportion of sugar used by industrial users has steadily increased while home use has declined, population density still remains the dominant factor in refined sugar distribution. Many industrial users (bakeries, soft drink manufacturers,

3/ Ibid.

* See centerfold

most confectionaries and ice cream manufacturers) locate their facilities near their consuming market in order to reduce delivery costs. However, other industrial users including fruit and vegetable canneries, citrus juice manufacturers and certain candy manufacturers locate their facilities close to their sources of raw materials. These firms influence refined sugar distribution particularly in California, (Lower Pacific), Oregon and Washington (Inter-mountain-Northwest) and Florida (Southeast). The Chicago-west territory is truly unique in its demand for refined sugar. Because of its central location, availability of raw materials for the food processing industries and favorable transportation rates, it absorbs a far greater share of refined sugar deliveries than population density alone would warrant. The foregoing table shows that the Chicago-West territory received 25.4 percent of U.S. refined sugar deliveries in 1970 but had only 19.9 percent of the U.S. population.

Even though refined sugar suppliers attempt to locate their production facilities to maximize volume of deliveries while minimizing transportation costs, an optional balance between supply and demand can not be attained in practice. Refined sugar moves among all territories, with some refined sugar being shipped to and from each. Factors affecting the supply-demand balance include fluctuation in supply due to seasonality of raw material production, disruptions in transportation services caused by dock and rail strikes and the location of most domestic raw material (sugarbeets and sugarcane) sources in areas of relatively low population density.

All four of the marketing territories that have net inflows of refined sugar need significant quantities of additional sugar but the territory receiving by far the greatest quantity is the Chicago-West territory which received a net inflow of 1.3 million tons of refined sugar during 1970, over 47 percent of all sugar delivered within the territory. It is centrally located, has 20 percent of U.S. population, and includes Chicago which is a major distribution center for processed foods, many of which contain sugar. Various freight carriers, because of the availability of backhaul business, have been able to establish attractive freight rates between Chicago and other large population centers. This has led to a highly competitive sugar market.

The other territories needing net additions to supply are the Northeast, Southeast and Southwest. The Northeast absorbed over four million tons of sugar, almost 50 percent more than that distributed in the second ranked Chicago-West territory. Because of the large quantity absorbed, the net inflow of 325 thousand tons in 1970 represented only eight percent of total distribution in the territory. The 310 thousand net tons shipped into the Southeast was 33 percent of the total distribution of 931 thousand tons. The 157 thousand net tons that moved to the Southwest represented 25 percent of the total territorial distribution of 625 thousand tons.

With relatively large productive resources and relatively low population (except for the State of California) three territories-- the Gulf, Intermountain-Northwest and Lower Pacific -- produce more refined sugar than they can utilize within their own territories and so have net outflows. The Gulf territory, with extensive sugar cane acreage and sugar cane factories in Louisiana and with a major port for importing offshore raw cane sugar at New Orleans, has by far the greatest quantity to market outside its own boundaries. In 1970, a net of 1.2 million tons of refined sugar moved from the Gulf to other territories with 622 thousand tons going to the Chicago-West territory, 237 thousand to the Northeast, 267 thousand to the Southeast, and 111 thousand to the Southwest. Having large beet acreage and low population, the Intermountain-Northwest produced sufficient sugar to become the No. 2 supplier of refined sugar to other territories with net shipments of 486 thousand tons which outpaced net shipments from the Lower Pacific by over 100 thousand tons. The Chicago-West territory was again the primary recipient of this sugar, receiving 545 thousand tons from the Intermountain-Northwest and 260 thousand tons from the Lower Pacific.

The Lower Pacific territory, although composed of only two States, is third in total distribution of refined sugar within its own territory because of large population and the food processing industries, especially fruit canning. Distribution totalled 1,202 thousand tons in 1970 (Table 2). Even so, outbound sugar of 402 thousand tons exceeded inbound sugar (26 thousand tons) by 376 thousand tons. The Lower Pacific territory that year had an abnormal reduction in its capacity to furnish refined sugar -- to some extent to its own territory and to a much greater extent to other territories due to a prolonged strike from June 1 to September 22 at the California and Hawaiian cane sugar refinery in California. This dislocation affected the pattern of deliveries from other areas to those normally supplied by the Lower Pacific territory. It is estimated that as much as an additional 300 thousand tons would have been available from the Lower Pacific territory save for the strike, most of which would have moved to other territories, principally to the Chicago-West and Intermountain-Northwest. Had this additional tonnage been shipped, the Lower Pacific territory would have replaced the Inter-mountain-Northwest as the number two supplier of refined sugar to other territories.

1970 Movement as Compared with 1958

Refined sugar distribution to the United States experienced a 25 percent increase between 1958 and 1970. In terms of tonnage, distribution rose by 2,143 thousand tons going from 8,481 thousand up to 10,624 thousand tons. This increase was a result of a 16.7 percent rise in population and a 5.8 percent increase in per capita distribution of sugar (going from 96.9 pounds in 1958 to 102.5 pounds in 1970).

The Increase In Population, Distribution and Originating Shipments of Refined Sugar, 1970 Over 1958, By Territory

Territory	Population	Distribution	Originating shipments
	1,000	1,000 tons	
Northeast	9,683	391	306
Chicago-West	4,197	973	427
Lower Pacific	5,801	332	242
Southeast	3,824	229	67
Gulf	1,605	-10	515
Southwest	2,283	125	137
Intermountain-Northwest	1,477	103	449
Total	28,870	2,143	2,143
		<u>Percent</u>	
Northeast	13.7	10.7	9.0
Chicago-West	11.6	56.3	43.0
Lower Pacific	36.4	38.2	18.1
Southeast	25.1	32.6	12.1
Gulf	9.6	-1.4	34.4
Southwest	18.3	25.0	41.8
Intermountain-Northwest	23.5	44.6	120.1
Average	16.7	25.3	25.3

Refined sugar movement among territories saw an even greater rise proportionally, than the increase in overall distribution. Interterritorial movement increased by 727 thousand tons or 38 percent during the 1958-70 period. Interterritorial movement represented 24.7 percent of total distribution in 1970 as compared to 22.4 percent in 1958. This occurred because of the unevenness of the expansion in each territory's ability to supply sugar as compared to its increased need for sugar as shown in the following table:

Table 1. Movement of refined sugar among marketing territories from primary distributors in each territory, 1958 and 1971

Marketing territory	Out movement	In movement	Net movement
1,000 tons			
<u>Northeast</u>			
1958	142	382	(in) 240
1970	87	412	(in) 325
<u>Southeast</u>			
1958	26	174	(in) 148
1970	21	331	(in) 310
<u>Gulf</u>			
1958	731	47	(out) 684
1970	1,253	44	(out) 1,209
<u>Chicago-west</u>			
1958	189	924	(in) 735
1970	211	1,492	(in) 1,281
<u>Southwest</u>			
1958	58	228	(in) 170
1970	67	224	(in) 157
<u>Intermountain Northwest</u>			
1958	256	115	(out) 141
1970	585	99	(out) 486
<u>Lower Pacific</u>			
1958	494	26	(out) 468
1970	402	24	(out) 378
<u>Total</u>			
1958	1,896	1,896	
1970	2,626	2,626	

Table 2. Movement of refined sugar from primary distributors

Origin	Destination							Total U.S.
	: North- : east	: South- : east	: Gulf	: Chicago- : west	: South- : west	: Intermountain : Northwest	: Lower : Pacific	
1,000 tons								
Northeast								
1958	3,256	73	3	60	*	*	6	3,398
1970	3,617	64	1	21	*	1	*	3,704
Southeast								
1958	6	528	20	0	0	0	0	554
1970	9	600	12	0	*	0	0	621
Gulf								
1958	167	97	762	374	92	0	1	1,493
1970	237	267	755	622	111	*	16	2,008
Chicago-west								
1958	122	1	14	805	47	2	3	994
1970	127	0	14	1,210	65	3	2	1,421
Southwest								
1958	*	3	10	44	272	*	1	330
1970	8	0	12	44	401	1	1	467
Intermountain Northwest								
1958	38	0	*	190	12	118	16	374
1970	23	0	4	545	8	238	5	823
Lower Pacific								
1958	49	0	*	256	77	112	844	1,338
1970	8	*	1	260	40	93	1,178	1,580
Total U.S.								
1958	3,638	702	809	1,729	500	233	870	8,481
1970	4,029	931	799	2,702	625	336	1,202	10,624

* Less than 0.5 thousand tons.

Percentage Point Change in Territorial Standing
Compared with total U.S.,
1970 over 1958

Territory	Population	Distribution	Originating shipment
		Percentage points	
Lower Pacific	1.5	1.0	-0.9
Southeast	0.6	0.5	-0.7
Intermountain-Northwest	0.2	0.5	3.3
Southwest	0.1	0	0.5
Gulf	-0.6	-2.0	1.3
Chicago-West	-0.9	5.0	1.7
Northeast	-1.0	-5.0	-5.2

The direction of the net flow pattern among territories remained the same in 1970 as in 1958. In spite of the increased distribution of refined sugar in all but the Gulf territory^{4/}, net flow figures declined for two territories, the Southwest (net inflow) and the Lower Pacific (net outflow).

The Southwest found less need for shipments from other territories as it became more self-sufficient and thereby experienced a seven percent decline in net inflow.

The Lower Pacific territory has traditionally received between 70 and 85 percent of the sugar shipments from Hawaii. In addition, California's sugarbeet production almost doubled during the 1958-70 period. Population growth along with increased use of refined sugar for industrial use (canning, baking, etc.) absorbed more than the 1970 increase in sugar supplies. However, the decline in net shipments of refined sugar from the Lower Pacific territory for 1970 resulted from the reduced supplies caused by the C&H strike mentioned earlier in this article. Had the estimated 300 thousand tons lost through the strike also been shipped to other territories, the out movement would have exceeded 1958 by 45 percent and put the Lower Pacific territory in second place as the supplier to other territories in place of the Intermountain-Northwest territory.

Although the net movement into the Northeast increased by 84 thousand tons to a total 323 thousand tons (Table 1) or by 35 percent between 1958 and 1970, the movement accounted for only eight percent of the territory's total distribution, one percentage point greater than the seven percent in 1958. The Chicago-West territory experienced a remarkable 56 percent increase in distribution in 1970 as compared to 1958 going from 1,729 thousand tons to 2,702 thousand tons. To achieve this, the region needed to increase the net inflow of supplies by 74 percent (546 thousand tons), jumping from 735 thousand tons to 1,281 thousand tons.

Distribution in the Southeast increased by 33 percent (299 thousand tons) between 1958 and 1970. The major portion of this increase came from the larger net movement into the territory from other territories as supplies originating within the Southeast for distribution there increased by only 14 percent (72 thousand tons). The movement of refined sugar into the Southeast during 1970 came principally from the Gulf territory, 267 thousand tons, with 64 thousand coming from the Northeast.

^{4/} A 35 percent drop in refined sugar deliveries in Mississippi and a 10 percent decrease in Alabama more than offset increased deliveries in Arkansas, Louisiana and Tennessee thus causing an over-all decline in deliveries in the Gulf territory.

The Intermountain-Northwest territory experienced an increase in refined sugar distribution of almost 45 percent between 1958 and 1970 notwithstanding a population increase of only 23.5 percent. However, sugarbeet acreage increased even more (65 percent) leading to an increase of 120 percent in the total quantity of Intermountain-Northwestern sugar marketed. Net movement to other territories increased even more percentagewise -- the 486 thousand tons shipped in 1970 being two and one-half times greater than the 141 thousand net tons shipped in 1958.

Observations

Although the trend toward factory use and away from household use of refined sugar continues (although at a reduced rate recently), location economics dictate that end-users such as bakeries, soft drink sirup manufacturers and most confectioners locate their production facilities as close as possible to population centers. Fruit and vegetable canneries and citrus juice manufacturers are exceptions. They necessarily locate their facilities near their principal raw material sources and they use a significant portion of the refined sugar consumed. Therefore, population density and the location of the production of raw materials such as fruits and vegetables appear to be the primary determinates as to where refined sugar deliveries will be made. A third determinate involves transportation considerations somewhat aside from distance as illustrated by the Chicago-West territory with its unique set of advantages: proximity to most of the raw materials needed by food product manufacturers (who also need refined sugar as an ingredient); central location geographically to all markets; and transportation at favorable rates.

Except for the Northeast and Gulf territories, the percentage increase in sugar deliveries since 1958 more than matched the percentage increase in population with the Chicago-West territory being by far the biggest gainer. The shift to the industrial use of refined sugar (and away from household use) apparently was not compensated for in the Northeast and Gulf territories by sufficient additions of baker, soft drink and other food manufacturing facilities. However, location economics will probably dictate that a level will be reached beyond which it will be uneconomical to further reduce, proportionately, the capacity of "end use" facilities in the Northeast and Gulf territories which would then stabilize or reverse the current trend to those territories, i.e., losing their proportionate share of refined sugar deliveries.

The increase in beet sugar production in the Western States appears to have exerted the greatest impact on the source of refined sugar shipments during the 1958-70 period. Unfortunately, the strike at the California and Hawaiian cane sugar refinery in California distorted the normal pattern of refined shipments from the Lower Pacific territory (reduced them below expected levels) in 1970. As the data now stand, the Gulf territory had the greatest actual increase in shipments and took third place on a percentage basis. The Intermountain territory had the largest proportional increase and the second largest actual increase. The Chicago-West territory ranked third in increased tonnage shipped and second proportionally. The Southwest also had a large percentage increase in shipments of refined sugar.

With beet acreage stabilizing in the last few years, the potential for further increases in refined sugar supplies might shift to the mainland cane and offshore cane sources. This would put the Gulf territory particularly in a favorable position as a supplier of refined sugar in view of its port facilities and sugar refineries in New Orleans plus mainland cane acreage. The other territories having cane sugar refineries such as the Northeast as well as the Southeast which also has sugarcane acreage, would also stand to benefit.

ADMINISTRATIVE ACTIONS RELATING TO 1972 SUPPLIES

USDA ANNOUNCES DECLARATION, PRORATION OF ADDITIONAL 1972 SUGAR QUOTA DEFICIT

The U. S. Department of Agriculture on April 27 declared a deficit of 4,273 short tons, raw value, in the sugar quota for Haiti and its proration to other Western Hemisphere countries.

Information available to USDA indicates Haiti will be unable to fill its current quota by the quantity announced today. Sec. 204(a) of the Sugar Act requires USDA to periodically determine, not less frequently than at 60-day intervals, whether any area or country will fail to fulfill its quota obligation.

In accordance with Sec. 202 (d)(4) of the Sugar Act, each foreign country which will not be able to fill its 1972 quota should notify USDA by June 1 as to the extent of such quota shortfall and the reason therefor to avoid a possible reduction in its subsequent year's quota.

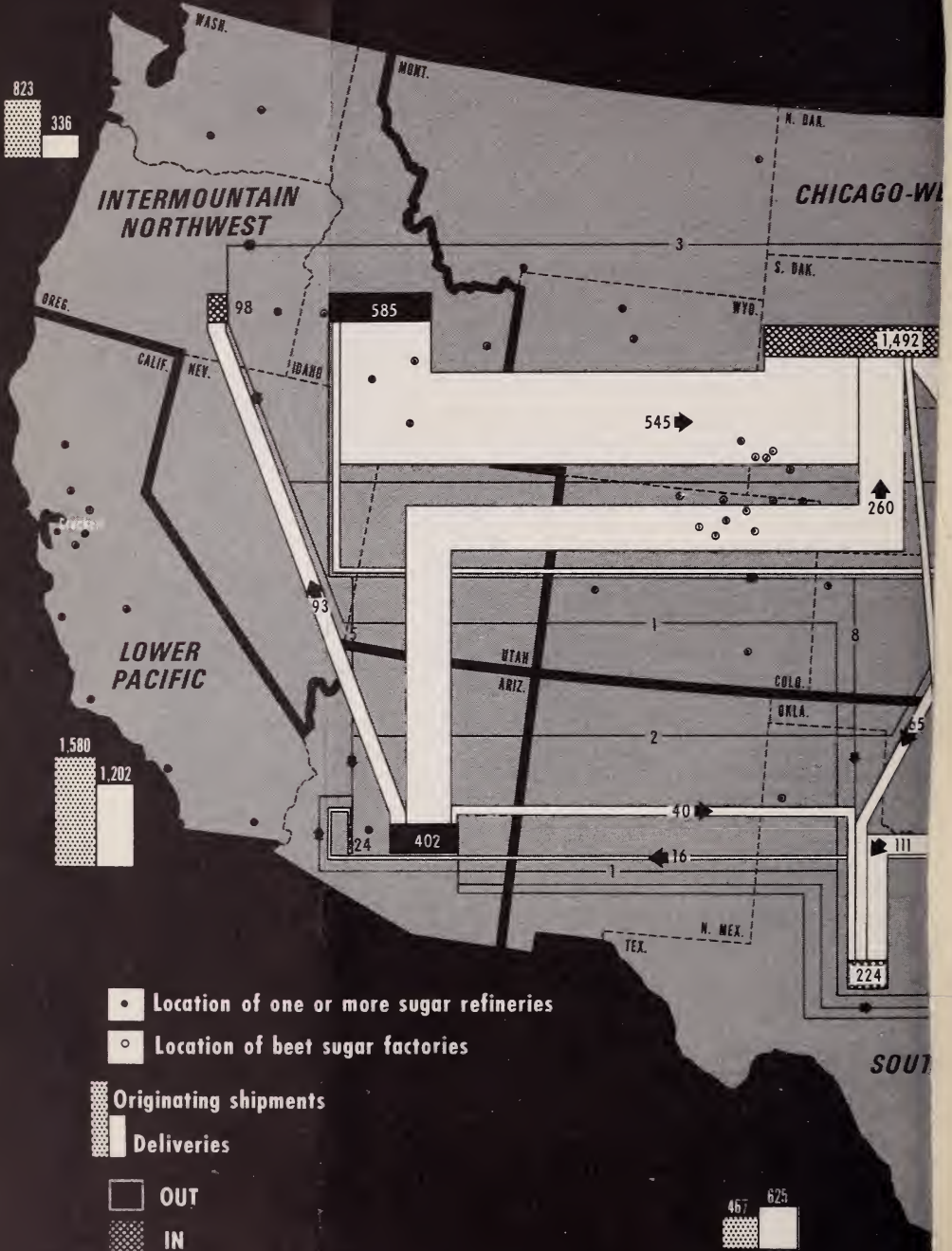
Deficits prorations, together with revised quotas, are shown on the following table:

Production area	: Change in quota	: Basic quota	: Temporary quotas and prorations pursuant to Sec. 202(d) 1/	: Deficits and deficit prorations	: Total quotas and prorations
Short tons, raw value					
Domestic beet area		3,787,333		-287,333	3,500,000
Mainland cane area		1,677,667			1,677,667
Hawaii		1,218,238			1,218,238*
Puerto Rico		855,000		-650,000	205,000*
Total domestic area		7,538,238		-937,333	6,600,905
Philippines		1,126,020		281,950	1,407,970*
Dominican Republic	908	429,771	145,293	129,521	704,585
Mexico	803	380,079	128,494	114,545	623,118
Brazil	784	370,678	125,315	111,712	607,705
Peru	561	265,249	89,673	79,939	434,861
West Indies	292	138,333	46,766	41,689	226,788
Ecuador	116	54,729	18,502	16,494	89,725
Argentina	109	51,371	17,367	15,482	84,220
Costa Rica	98	46,335	15,664	35,771	97,770
Colombia	97	45,663	15,438	13,762	74,863
Panama	60	28,539	9,649	8,601	46,789*
Nicaragua	92	43,313	14,643	13,054	71,010
Venezuela	87	41,298	13,962	12,446	67,706
Guatemala	84	39,620	13,394	29,890	82,904
El Salvador	61	28,875	9,762	8,702	47,339
British Honduras	48	22,832	7,718	6,880	37,430
Haiti	-4,273	20,817	7,038	1,957	29,812
Bahamas	38	18,131	6,130	5,464	29,725
Honduras	17	8,058	2,724	6,844	17,626
Bolivia	9	4,365	1,476	1,315	7,156
Paraguay	9	4,365	1,476	1,315	7,156
Australia		168,551	41,932		210,483
Republic of China		70,174	17,458		87,632
India		67,487	16,790		84,277
South Africa		47,678	11,861		59,539
Fiji Islands		36,933	9,188		46,121
Mauritius		24,846	6,181		31,027
Swaziland		24,846	6,181		31,027
Thailand		15,445	3,843		19,288
Uganda		12,423	3,090		15,513
Malagasy		10,073	2,506		12,579
Ireland		5,351			5,351*
Total foreign	0	3,652,248	809,514	937,333	5,399,095
Total	0	11,190,486	809,514		12,000,000

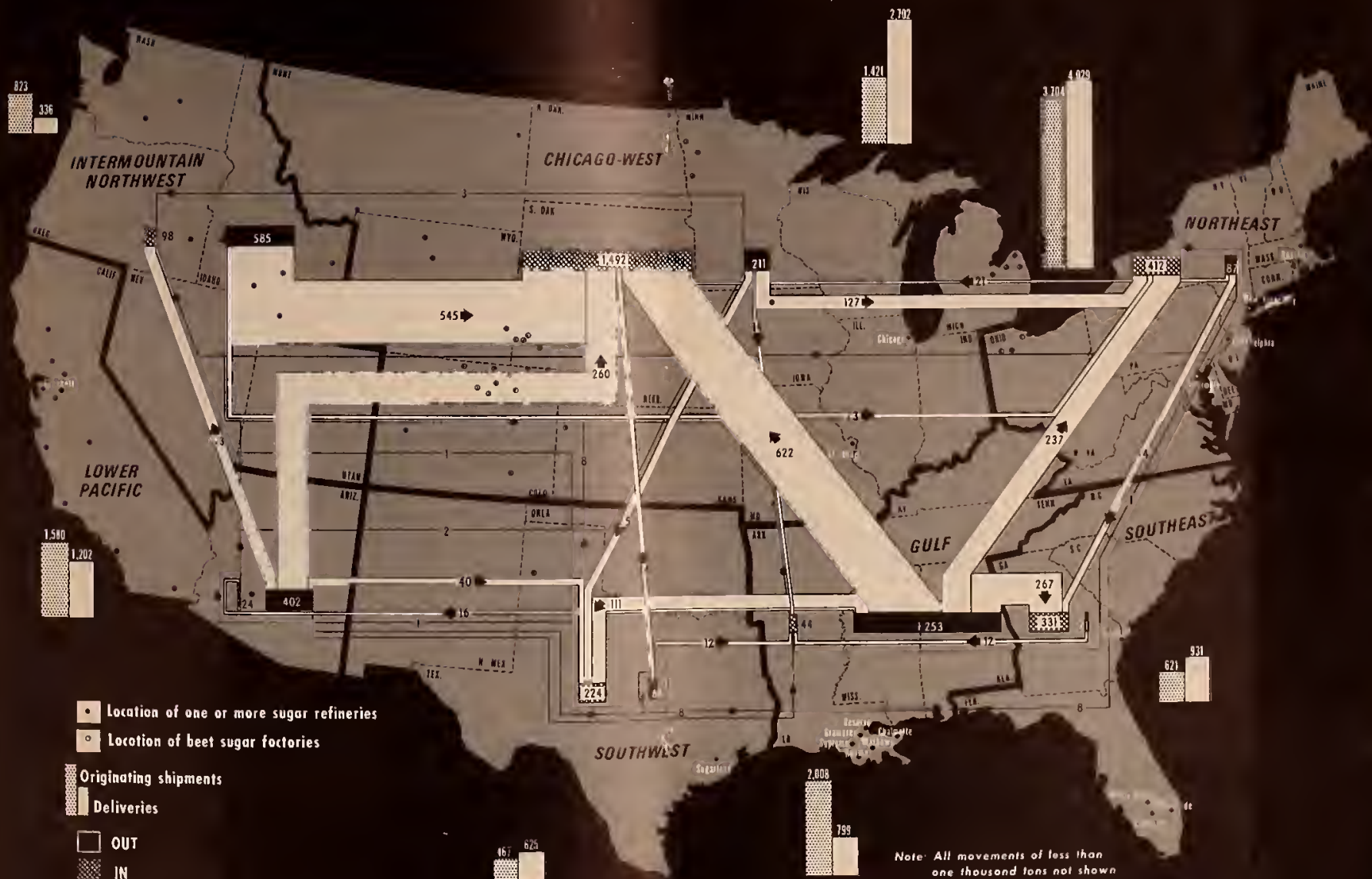
1/Prorations of the quota withheld from Cuba and Southern Rhodesia. *Direct consumption limits in tons: Hawaii - 38,646; Puerto Rico-166,500; Philippines-59,920; Panama - 13,817; Ireland -5,351

REFINED SUGAR MOVEMENT WITHIN AND AMONG

(F)



(Figures in Thousand Tons)



OTHER ADMINISTRATIVE ACTIONSUSDA ANNOUNCES ALLOCATION OF ACREAGE FOR TEXAS CANE SUGAR AREA:May 11, 1972

An allocation of 25,700 acres to be planted to sugarcane in the Lower Rio Grande Valley area of Texas was announced by the U. S. Department of Agriculture.

Mainland sugar cane production in the United States previously has been concentrated in Louisiana and Florida. The new Texas sugarcane area is the first to be designated in nearly half a century. An allocation of 25,700 acres, based on normal yields, beginning in 1973 should return a cash crop worth more than \$25 million to the growers. The area involved has been producing cotton, citrus and vegetables, but has had increasing difficulties with growing and marketing of these crops. Consequently, USDA officials said, the new sugar cane crop should provide a more stable economic base for farmers in the four counties involved -- Hidalgo, Cameron, Willacy and Starr -- along the lower Rio Grande river.

Members of the Rio Grande Valley Sugar Growers, Inc., a cooperative, presently have 2,500 acres in cane which they expect will provide seed cane for a full crop of 25,700 acres of cane for processing which is scheduled to commence in November 1973. The co-op estimates 25,700 acres with a yield of 42 tons of cane per acre and a recovery of 210 pounds of sugar per ton of cane will result in total sugar production of 113,000 tons.

This allocation will provide the acreage required to yield a quota of not more than 100,000 short tons, raw value, of sugar and provide a normal carryover inventory for a new cane sugar producing area as authorized in the 1971 amendments to the Sugar Act.

The Sugar Act of 1948, as amended, further provides that in establishing a quota and allocating the acreage required for such quota, the determination shall be based upon the firmness of capital commitment and the suitability of the area for growing sugarcane and, where two or more areas are involved, the relative qualifications of such areas under such criteria.

At a public hearing held in Washington, D.C., on Dec. 2, 1971, two localities applied for acreage. The Imperial Valley of California requested 12,500 acres for sugarcane for processing in a beet sugar factory which it was hoped could be converted for sugarcane processing in the off-season. However, this locality presented no firm plans and therefore did not meet the requirements necessary for the allocation of sugarcane acreage.

The Lower Rio Grande Valley of Texas requested 25,700 acres for sugarcane production. This locality presented a complete plan for the production of sugarcane and the construction of a processing facility. There is a firm commitment of capital, and the suitability of the locality and interest of farmers in growing sugarcane has been demonstrated. The requirements necessary for the allocation of acreage have been met.

The acreage provided will be allocated to growers who are members of the cooperative. The order does not limit acreage in any way but only those who receive an allocation are assured of the allocated acreage for the 1974 and 1975 crops if acreage restrictions are then in effect. (See May 13, 1972 Federal Register).

Table 3.- Sugar supply and disposition by primary distributors, January-March 1972

Item	Beet proc- essors	Importers	Main- land cane proc- essors 1/	Refiners		Net total
				Raw	Refined	
Supply						
1. Inventory Jan. 1, 1972	1,342,563	1,030	284,958	781,212 2/	272,861 2/	2,682,624
2. Production and movement						
a. Received as direct- consumption sugar		16,996			558	17,554
b. Produced from beets or cane	867,504		435,338	4,236		
Less deliveries to refiners			290,504			1,016,574 3/
c. Receipts of raws by refiners				1,795,167 4/		
Less raws melted				1,889,546		-94,379 5/
d. Refined from raws melted					1,879,888	1,879,888
e. Adjustments	+3,369	-463	-2,972	+13	+3,814	+3,761
f. Sub-total	870,873	16,533	141,862	-90,130	1,884,260	2,823,398
3. Net total supply	2,213,436	17,563	426,820	691,082	2,157,121	5,506,022
DISPOSITION						
4. Distribution for						
a. Quota purposes	731,907	11,610	19,521	2,540	1,811,474	2,577,052
b. Export					15,333	15,333
c. Livestock feed		3,510		48	7,368	10,926
d. Alcohol					4,579	4,579
e. Sub-total	731,907	15,120	19,521	2,588	1,838,754	2,607,890
5. Inventory March 31, 1972	1,481,529	2,443	407,299	688,494 6/	318,367 6/	2,898,132
6. Total distribution and inventory	2,213,436	17,563	426,820	691,082	2,157,121	5,506,022

1/ Establishments that acquire no raw sugar from others for refining. Processor-refiners included with refiners.

2/ Includes mainland cane sugar not charged to quota: Raws, 136,676; Refined, 9,330; Total, 146,006

3/ Production less deliveries of raw sugar to refiners

4/ Includes 290,504 tons received from mainland cane processors

5/ Receipts of raw sugar by refiners less melt

6/ Refiners' inventories include mainland cane sugar not charged to quota: Raws, 46,599; Refined, 3,717 Total, 50,316.

Table 4- Refined sugar production and month-end stocks

Year and month	Production		Month-end stocks 1/	
	Cane sugar refiners	Beet sugar processors	Cane sugar refiners	Beet sugar processors
1,000 short tons, raw value				
1967-71 monthly average	632	260	280	1,134
1970 monthly average	637	293	254	1,144
1971 monthly average	656	286	303	1,159
1971				
May	661	169	372	1,335
June	746	105	357	1,136
July	697	96	356	916
August	685	107	315	647
September	674	170	284	412
October	654	575	284	705
November	554	725	256	1,131
December	637	593	273	1,343
1972				
January	605	477	282	1,604
February	572	230	333	1,640
March 2/	707	164	318	1,482
April 3/	585	147	338	1,390
Last 12-month average	648	296	314	1,145

1/ Includes over-quota and quota exempt. 2/ Revised 3/ Preliminary

Table 5- Distribution of sugar by primary distributors, January-March 1972 and 1971

Item	1972	1971	Change 1971 to 1972
Short tons, raw value			
<u>Continental United States</u>			
Refiners' raw	2,588	2,997	-409
Refiners' refined	1,838,754	1,840,183	-1,429
Sub-total	1,841,342	1,843,180	-1,838
Beet processors' refined	731,907	591,406	+140,501
Importers' direct consumption	15,120	17,940	-2,820
Mainland sugarcane processors'	19,521	19,300	+221
Total	2,607,890	2,471,826	+136,064
For: Export	15,333	24,676	-9,343
Livestock feed	10,926	7,477	+3,449
Alcohol	4,579	743	+3,836
Continental consumption ^{1/}	2,577,052	2,438,930	+138,122
Puerto Rico	30,785	26,980	+3,805
Hawaii	7,919	7,509	+410

^{1/} Includes deliveries for United States military forces at home and abroad

Table 6- Stocks of sugar held by primary distributors in the continental United States, March 31, 1972 and 1971

Item	1972	1971	Change 1971 to 1972
Short tons, raw value			
Refiners' raw	688,494	500,335	+188,159
Refiners' refined	318,367	275,075	+43,292
Sub-total ^{1/}	1,006,861	775,410	+231,451
Beet processors' refined	1,481,529	1,501,477	-19,948
Importers' direct consumption	2,443	11,042	-8,599
Mainland sugarcane processors'	407,299	412,931	-5,632
Total	2,898,132	2,700,860	+197,272

^{1/} Included mainland cane sugar not charged to quota: 1972-Raws, 46,599; Refined, 27,415; Total, 74,014; 1971 - Raws - 36,110; Refined, 7,693; Total - 43,803

Table 7 Distribution of sugar by primary distributors in the continental United States, April and January-April 1972 and 1971

Item	1972 ^{1/}	1971		
	April	Jan.-April	April	Jan.-April
Short tons, raw value				
Refiners	564,759	2,406,101	616,515	2,459,695
Beet processors' refined	238,598	970,505	227,979	819,385
Importers' direct consumption	5,136 ^{2/}	20,256	10,565	28,505
Mainland sugarcane processors'	5,000 ^{2/}	24,521	5,145	24,445
Total	813,493	3,421,383	860,204	3,332,030
For: Export	n.a.	15,333	6,047	30,723
Livestock feed	n.a.	10,926	3,068	10,545
Alcohol	n.a.	4,579	423	1,166
Continental consumption ^{3/}	813,493	3,390,545	850,666	3,289,596

^{1/} Preliminary ^{2/} Estimated ^{3/} Includes deliveries for U.S. military forces at home and abroad

Table 8- Stocks of sugar held by primary distributors in the continental United States,

Item	1972 ^{1/}	1971	Change 1971 to 1972
Short tons, raw value			
Refiners' raw	766,636	538,320	+228,316
Refiners' refined	338,130	326,236	+11,894
Sub-total	1,104,766	864,556	+240,210
Beet processors' refined	1,390,447	1,425,262	-34,815
Importers' direct consumption	2,094 ^{2/}	14,253	-12,159
Mainland sugarcane processors'	350,000 ^{2/}	355,681	-5,681
Total	2,847,307	2,659,752	+187,555

^{1/} Preliminary ^{2/} Estimated

Table 9- Sugar receipts of refiners and importers by source of supply^{1/} January-March 1972 and 1971

Source of supply	Raw sugar		Direct consumption		Total	
	1972	1971	1972	1971	1972	1971
Short tons, raw value						
<u>OFFSHORE</u>						
Foreign						
Argentina	37,077	25,098			37,077	25,098
Australia	17,114				17,114	
Bahamas		5,485				5,485
Brazil	199,359	218,450			199,359	218,450
British Honduras		5,002				5,002
British West Indies	29,092	26,703			29,092	26,703
China, Republic of			1		1	
Colombia	16,644	21,237			16,644	21,237
Costa Rica	29,174	25,438			29,174	25,438
Denmark			10	10	10	10
Dominican Republic	239,300	228,937			239,300	228,937
Ecuador	22,908	14,329	9		22,917	14,329
El Salvador	30,960	16,891			30,960	16,891
French West Indies		4,910				4,910
Guatemala	30,806	27,349			30,806	27,349
Haiti	3,581				3,581	
Honduras	5,216	4,879			5,216	4,879
India			6	3	6	3
Ireland			4,334	3,508	4,334	3,508
Mauritius	19,540				19,540	
Mexico	171,814	175,738	10	5	171,824	175,743
Netherlands				10		10
Nicaragua	35,632	36,731			35,632	36,731
Panama	7,634	5,565			7,634	5,565
Paraguay				10		10
Peru	102,971	81,130			102,971	81,130
Philippines	238,393	159,658		3,317	238,393	162,975
South Africa	57,681	16,630			57,681	16,630
Sweden			7	5	7	5
United Kingdom			3,510	3,509	3,510	3,509
Venezuela	38,760	9,961			38,760	9,961
Total	1,333,656	1,110,121	7,887	10,377	1,341,543	1,120,498
Domestic						
Hawaii	170,199	135,688	558 ^{2/}	971 ^{2/}	170,757	136,659
Puerto Rico		20,043	9,109	14,702	9,109	34,745
Total	170,199	155,731	9,667	15,673	179,866	171,404
Total offshore	1,503,855	1,265,852	17,554	26,050	1,521,409	1,291,902
Mainland cane area	294,740	334,102	0 ^{3/}	0 ^{3/}	294,740	334,102
Acquired for reprocessing and samples	808	920			808	920
Grand total	1,799,403	1,600,874	17,554	26,050	1,816,957	1,626,924
^{1/} Includes sugar as detailed in Table 10 ^{2/} Refined sugar received by refiners.						
^{3/} Refined sugar produced direct from cane by processor-refiner.						
Table 10- Receipts of quota-exempt and over-quota sugar included in Table 9						
Purpose	Refiners		Importers		Total	
	1972	1971	1972	1971	1972	1971
Short tons, raw value						
<u>FOR EXPORT</u>						
Brazil		5,276				5,276
Dominican Republic	5,699	22,181			5,699	22,181
El Salvador	1,032				1,032	
Puerto Rico	342	154			342	154
Total	7,073	27,611			7,073	27,611
<u>FOR LIVESTOCK FEED</u>						
Brazil	1,495	3,506			1,495	3,506
Dominican Republic		4,233				4,233
United Kingdom			3,510	3,509	3,510	3,509
Total	1,495	7,739	3,510	3,509	5,005	11,248
<u>FOR ALCOHOL</u>						
Brazil		11,641				11,641
Total		11,641				11,641
<u>HELD PENDING AVAILABILITY OF QUOTA</u>						
Bahamas		484				484
Colombia		10,557				10,557
Guatemala		1,596				1,596
Nicaragua		7,174				7,174
South Africa	771				771	
Total held pending	771	19,811			771	19,811
<u>IN CUSTOMS CUSTODY</u>						
Hong Kong				40		40
Total				40		40
GRAND TOTAL	9,339	66,802	3,510	3,549	12,849	70,351

Table 11 Status of quotas and charges as of April 30, 1972

Source of supply	Quotas and prorations	Charges to quotas 1/			Balances 2/
		Set-aside	By SU-3	Total 2/	
Short tons, raw value					
Domestic beet sugar	3,500,000			971,000	2,529,000
Mainland cane sugar	1,677,667			475,000	1,202,667
Hawaii	1,218,238			278,108	940,130
Puerto Rico	205,000			41,796	163,204
Total	6,600,905			1,765,904	4,835,001
Republic of the Philippines	1,407,970			423,882	984,088
Argentina	84,220			37,849	46,371
Australia	210,483			62,799	147,684
Bahamas	29,725			61	29,664
Bolivia	7,156			54	7,102
Brazil	607,705			325,550	282,155
British Honduras	37,430			9,030	28,400
China, Republic of	87,632			32,303	55,329
Colombia	74,863			16,366	58,497
Costa Rica	97,770			66,374	31,396
Dominican Republic	704,585			294,435	410,150
Ecuador	89,725			38,627	51,098
El Salvador	47,339			31,061	16,278
Fiji Islands	46,121			1,778	44,343
Guatemala	82,904			80,770	2,134
Haiti	29,812			9,002	20,810
Honduras	17,626			14,651	2,975
India	84,277			0	84,277
Ireland	5,351			5,351	0
Malagasy Republic	12,579			0	12,579
Mauritius	31,027			20,253	10,774
Mexico	623,118			288,620	334,498
Nicaragua	71,010			37,872	33,138
Panama	46,789			19,729	27,060
Paraguay	7,156			0	7,156
Peru	434,861			174,998	259,863
South Africa	59,539			59,539	0
Swaziland	31,027			271	30,756
Thailand	19,288			389	18,899
Uganda	15,513			0	15,513
Venezuela	67,706			47,500	20,206
West Indies	226,788			52,985	173,803
Total Foreign	5,399,095			2,152,099	3,246,996
Grand total	12,000,000			3,918,003	8,081,997

1/ Domestic beet and Mainland cane sugar marketings partly estimated; all other sugar entered or authorized for entry. 2/ Direct consumption charges and balances; Hawaii 824, 37,822; Panama 0, 3,817; Philippines 2,798, 57,122; Puerto Rico 12,419, 154,081; Ireland 5,351, 0.

1/ Domestic beet and Mainland cane sugar marketings partly estimated; all other sugar entered or authorized for entry. 2/ Direct consumption charges and balances; Hawaii 824, 37,822; Panama 0, 3,817; Philippines 2,798, 57,122; Puerto Rico 12,419, 154,081; Ireland 5,351, 0.

Table 12 Quota-exempt and over quota sugar authorized for entry as of April 30, 1972 1/

Country	Re-export	Feed	Alcohol	For refining under bond	Total
Short tons, raw value					
Brazil		1,495			1,495
Canada	3				3
Dominican Republic	5,699				5,699
El Salvador	1,032				1,032
South Africa				771	771
United Kingdom		5,265			5,265
Total	6,734	6,760		771	14,265

1/ In addition: (a) Under provisions of Sec. 212, 95 tons were entered as liquid sugar in small containers; 76 tons as first ten tons; (b) Raw sugar brought in for refining and return to Puerto Rico 342 tons; (c) tons of sugar in Customs custody for subsequent entry: Hong Kong 31; El Salvador 4,914.

Table 13- Mainland sugar: Production and quota charges January-March 1972 and 1971

Item	1972	1971	Change 1971 to 1972
Production		Short tons, raw value	
Mainland cane	435,646	391,029	+44,617
Domestic beet	870,873	738,733	+132,140
Total	1,306,519	1,129,762	+176,757
Quota Charges			
Mainland cane:			
Louisiana sugarcane processors			
For further processing	169,005	212,155	-43,150
For direct-consumption	1,415	1,844	-429
Louisiana processor-refiners	31,771	43,932	-12,161
Florida sugarcane processors	206,804	203,500	+3,304
Sub-total	408,995	461,431	-52,436
Beet processors	731,907	591,406	+140,501
Total	1,140,902	1,052,837	+88,065

Table 14. - Primary distribution of sugar, continental United States, by States, March 1972

State and region	Cane sugar refiners	Beet sugar processors	Importers of direct- consumption sugar	Mainland cane sugar mills	Total
Hundredweights ^{1/}					
<u>New England</u>					
Connecticut	138,677		800		139,477
Maine	50,902		2,016		52,918
Massachusetts	528,065		10,800		538,865
New Hampshire	63,232		806		64,038
Rhode Island	48,946		1,697		50,643
Vermont	26,285				26,285
Sub-total	856,107		16,119		872,226
<u>Mid-Atlantic</u>					
New Jersey	980,136	20	14,419		994,575
New York	1,516,004	54,333	34,088	420	1,604,845
Pennsylvania	1,383,899	21,892	19,771	1,008	1,426,570
Sub-total	3,880,039	76,245	68,278	1,428	4,025,990
<u>North Central</u>					
Illinois	752,475	1,689,370	2,400		2,444,245
Indiana	323,033	149,415	800		473,248
Iowa	63,743	155,242			218,985
Kansas	45,106	116,098			161,204
Michigan	334,762	396,446			731,208
Minnesota	59,892	208,469			268,361
Missouri	302,712	166,100			468,812
Nebraska	19,030	142,019			161,049
North Dakota	3,156	18,311			21,467
Ohio	777,177	466,794	2,960		1,246,931
South Dakota	3,724	24,460			28,184
Wisconsin	135,599	285,363			420,962
Sub-total	2,820,409	3,818,087	6,160		6,644,656
<u>Southern</u>					
Alabama	246,150			1,695	247,845
Arkansas	96,468	17,620			114,088
Delaware	218,700				218,700
District of Columbia	39,737				39,737
Florida	453,893			115,659	569,552
Georgia	636,975				649,413
Kentucky	202,011				202,011
Louisiana	327,160			3,438	330,052
Maryland	449,449	799	4,943		455,191
Mississippi	147,737				147,739
North Carolina	407,309		843	1,008	409,160
Oklahoma	115,863	36,744			152,607
South Carolina	212,733			1,008	213,741
Tennessee	387,424			2,026	389,450
Texas	704,039	171,629		2,380	878,048
Virginia	283,553		5,222		288,775
West Virginia	69,027	2,757			71,784
Sub-total	4,998,230	229,549	11,008	130,106	5,368,893
<u>Western</u>					
Alaska	2,134	1,845			3,979
Arizona	38,406	61,058			99,464
California	679,245	1,343,701			2,022,946
Colorado	21,136	138,320			159,456
Idaho	3,524	17,821			21,345
Montana	7,222	24,426			31,648
Nevada	5,550	8,406			13,956
New Mexico	5,239	18,279			23,518
Oregon	55,769	95,212			150,981
Utah	8,319	50,544			58,863
Washington	55,095	138,962			194,057
Wyoming	3,136	8,281			11,417
Sub-total	884,775	1,906,855			2,791,630
Grand total	13,439,560	6,030,736	101,555	131,534	19,703,395

1/ Reported as produced or imported and delivered except liquid sugar which is on a sugar solids content basis.

Table 15. - Primary distribution of sugar, continental United States, by States, January-March 1972

State and region	Cane sugar refiners	Beet sugar processors	Importers of direct- consumption sugar	Mainland cane sugar mills	Total
Hundredweights ^{1/}					
<u>New England</u>					
Connecticut	318,032	800	800		319,632
Maine	124,290	1,000	2,016	2,016	129,322
Massachusetts	1,282,499	18,890	25,696		1,327,085
New Hampshire	147,849		806	1,008	149,663
Rhode Island	114,711	2,900	2,145	1,008	120,764
Vermont	59,729				59,729
Sub-total	2,047,110	23,590	31,463	4,032	2,106,195
<u>Mid-Atlantic</u>					
New Jersey	2,431,831	38,236	33,121		2,503,188
New York	3,638,784	195,618	74,958	5,685	3,915,045
Pennsylvania	3,419,689	104,168	42,302	2,016	3,568,175
Sub-total	9,490,304	338,022	150,381	7,701	9,986,408
<u>North Central</u>					
Illinois	1,988,592	3,287,998	3,200		5,279,790
Indiana	859,914	422,168	800		1,282,882
Iowa	177,268	389,265			566,533
Kansas	113,191	281,071			394,262
Michigan	801,023	966,553			1,767,576
Minnesota	135,664	546,380			682,044
Missouri	745,001	390,099			1,135,100
Nebraska	61,291	323,020			384,311
North Dakota	4,680	74,076			78,756
Ohio	1,920,009	1,157,457	7,940		3,085,406
South Dakota	6,864	69,480			76,344
Wisconsin	350,086	632,219			982,305
Sub-total	7,163,583	8,539,786	11,940		15,715,309
<u>Southern</u>					
Alabama	621,629			7,892	629,521
Arkansas	269,385	44,783		1	314,169
Delaware	561,710		1,200		562,910
District of Columbia	102,120	1,000			103,120
Florida	1,190,827			313,078	1,503,905
Georgia	1,671,109		369	11,828	1,683,306
Kentucky	558,835				558,835
Louisiana	916,575		737	5,659	922,971
Maryland	1,152,997	14,215	11,053		1,178,265
Mississippi	381,128			100	381,228
North Carolina	1,023,812		843	4,032	1,028,687
Oklahoma	325,150	90,007		3	415,160
South Carolina	536,163			2,028	538,191
Tennessee	1,005,581	360		2,026	1,007,967
Texas	1,977,012	469,886		7,439	2,454,337
Virginia	773,876		8,035		781,911
West Virginia	175,845	8,357			184,202
Sub-total	13,243,754	628,608	22,237	354,086	14,248,685
<u>Western</u>					
Alaska	6,581	5,220			11,801
Arizona	90,757	122,756			213,513
California	1,678,330	2,721,153			4,399,483
Colorado	48,423	360,582			409,005
Idaho	7,283	53,777			61,060
Montana	19,996	59,024			79,020
Nevada	13,835	15,594			29,429
New Mexico	17,946	55,809			73,755
Oregon	140,201	222,900			363,101
Utah	26,565	147,060			173,625
Washington	140,891	363,990			504,881
Wyoming	5,418	22,627			28,045
Sub-total	2,196,226	4,150,492			6,346,718
Grand total	34,140,977	13,680,498	216,021	365,819	48,403,315

^{1/} Reported as produced or imported and delivered except liquid sugar which is on a sugar solids content basis.

Table 16-- Primary distribution of sugar, continental United States, by states, January-March 1972 and 1971

State and Region	Cane sugar		Beet		Total all	
	refiners		processors		Primary Distributors ^{1/}	
	1972	1971	1972	1971	1972	1971
Thousands of hundredweights ^{2/}						
New England						
Connecticut	318	325	1		319	330
Maine	124	127	1		129	127
Massachusetts	1,282	1,295	19	6	1,327	1,310
New Hampshire	148	91			150	91
Rhode Island	115	106	3		121	108
Vermont	60	63			60	63
Sub-total	2,047	2,007	24	6	2,106	2,029
Mid-Atlantic						
New Jersey	2,432	2,215	38	1	2,503	2,277
New York	3,639	3,858	196	79	3,915	4,009
Pennsylvania	3,420	3,217	104	49	3,568	3,324
Sub-total	9,491	9,290	338	129	9,986	9,610
North Central						
Illinois	1,989	2,327	3,288	2,667	5,280	4,997
Indiana	860	967	422	240	1,283	1,208
Iowa	177	374	389	352	567	726
Kansas	113	115	281	286	394	401
Michigan	801	660	967	829	1,768	1,489
Minnesota	136	145	546	527	682	672
Missouri	745	842	390	369	1,135	1,211
Nebraska	61	50	323	351	384	402
North Dakota	5	6	74	95	79	101
Ohio	1,920	1,971	1,158	649	3,085	2,623
South Dakota	7	4	70	69	77	73
Wisconsin	350	400	632	509	982	909
Sub-total	7,164	7,861	8,540	6,943	15,716	14,812
Southern						
Alabama	622	598			630	605
Arkansas	269	292	45	19	314	311
Delaware	562	488			563	488
District of Columbia	102	108	1		103	108
Florida	1,191	1,105			1,504	1,393
Georgia	1,671	1,581			1,683	1,589
Kentucky	559	527			559	527
Louisiana	916	743			923	753
Maryland	1,153	1,232	14	*	1,178	1,268
Mississippi	381	329			381	330
North Carolina	1,024	926			1,029	928
Oklahoma	325	321	90	71	415	392
South Carolina	536	498			538	498
Tennessee	1,006	1,014		*	1,008	1,015
Texas	1,977	1,953	470	406	2,454	2,373
Virginia	774	752			782	783
West Virginia	176	175	8	8	184	184
Sub-total	13,244	12,642	628	504	14,248	13,545
Western						
Alaska	7	4	5	8	12	12
Arizona	91	101	123	98	214	199
California	1,678	1,870	2,721	2,235	4,399	4,133
Colorado	48	56	360	334	409	390
Idaho	7	9	54	51	61	60
Montana	20	6	59	57	79	63
Nevada	14	14	15	13	29	27
New Mexico	18	17	56	51	74	68
Oregon	140	138	223	200	363	344
Utah	27	26	147	132	174	158
Washington	141	152	364	275	505	438
Wyoming	5	9	23	18	28	27
Sub-total	2,196	2,402	4,150	3,472	6,347	5,919
Grand total	34,141	34,202	13,680	11,054	48,403	45,915

^{1/} Includes deliveries by importers of direct-consumption sugar and mainland cane sugar mills.^{2/} Reported as produced or imported and delivered except liquid sugar which is on a sugar solids content basis.

* Less than 500 hundredweights.

Table 17- Sugar prices

Year and month	Raw cane sugar-spot price		Quota premium and discount 3/	Refined beet sugar - quoted wholesale (gross) 4/		
	Domestic	World		Eastern	Chicago-West	Pacific Coast
	sugar at NY: 1/ duty paid	sugar 2/				
Cents per pound						
1967-71 monthly	7.83	3.12	+3.67	10.51		10.55
1970 monthly average	8.07	3.75	+3.19	11.08	11.08	10.79
1971 " "	8.52	4.52	+2.87	11.59	11.59	11.37
1971						
May	8.46	4.35	+2.95	11.60	11.60	11.40
June	8.54	4.14	+3.24	11.60	11.60	11.40
July	8.58	4.20	+3.26	11.60	11.60	11.40
August	8.66	4.37	+3.17	11.60	11.60	11.40
September	8.57	3.99	+3.52	11.60	11.60	11.40
October	8.52	4.18	+3.28	11.60	11.60	11.40
November	8.63	4.20	+3.37	11.60	11.60	11.40
December	8.84	5.95	+1.83	11.60	11.60	11.40
1972						
January	9.10	8.25	-0.21 ^{5/}	11.69	11.69	11.40
February	9.02	8.63	-0.67 ^{5/}	11.90	11.90	11.40
March	9.16	8.74	-0.66	11.90	11.90	11.40
April	8.89	7.29	+0.52	11.90	11.90	11.70
Last 12-month average	8.75	5.69	+1.97	11.68	11.68	11.42
Year and month	Refined cane sugar - quoted wholesale (gross) 4/					Retail U.S.
	North	South	Gulf	Chicago-West	Pacific Coast	
	East	East				
Cents per pound						
1967-71 Monthly average	11.47	11.05	10.76	10.53	10.55	12.67
1970 Monthly average	11.97	11.41	11.04	11.08	10.79	12.97
1971 " "	12.48	12.07	11.57	11.59	11.37	13.61
1971						
May	12.40	12.00	11.50	11.60	11.40	13.54
June	12.55	12.07	11.50	11.60	11.40	13.60
July	12.60	12.20	11.70	11.60	11.40	13.64
August	12.60	12.20	11.70	11.60	11.40	13.70
September	12.60	12.20	11.70	11.60	11.40	13.74
October	12.60	12.20	11.70	11.60	11.40	13.74
November	12.60	12.20	11.70	11.60	11.40	13.74
December	12.60	12.20	11.70	11.60	11.40	13.74
1972						
January	12.81	12.46	11.96	11.69	11.40	13.76
February	13.00	12.70	12.20	11.90	11.40	13.82
March	13.00	12.74	12.20	11.90	11.40	13.90
April	13.20	12.90	12.20	11.90	11.70	13.94
Last 12-month average	12.71	12.34	11.81	11.68	11.42	13.74

1/ Spot prices are for bulk sugar under Contract No. 10, duty paid or duty free, full duty rate .625 cent per pound.

2/ Spot prices are for bulk sugar under Contract No. 11 which, beginning Jan. 1, 1971, replaces Contract No. 8. The terms of these contracts are f.o.b. and stowed at Greater Caribbean ports, including Brazil.

3/ The No. 10 "domestic bulk" contract has been adjusted by deducting duty (.625¢), computed freight from the Greater Caribbean ports (including Brazil), insurance and unloading charges before calculating the differential from the "World Contract" spot prices.

4/ These are basis prices in 100-pound paper bags, NOT delivered prices. To obtain delivered prices add "Freight Prepays" and deduct discounts and allowances. For illustration see Sugar Reports No. 230, July 1971, pages 5 to 23.

5/ Revised

Table 18 Wholesale price quotations for sugar, dextrose and corn sirup

Period	Refined sugar wholesale North east 1/	Dextrose N.Y. 2/		Corn sirup New York 3/		Dextrose relative to refined sugar		Corn sirup relative to refined sugar	
		Quoted	Dry basis 4/	Quoted	Dry basis 4/	Quoted	Dry basis	Quoted	Dry basis
		Cents per pound				Percent			
1952	8.62	7.29	7.92	7.37	9.18	85	92	85	106
1953	8.72	7.35	7.99	7.32	9.12	84	92	84	105
1954	8.72	7.32	7.96	7.32	9.12	84	91	84	105
1955	8.59	7.22	7.85	7.25	9.03	84	91	84	105
1956	8.77	7.28	7.91	7.15	8.90	83	90	82	101
Average 1952-56	8.68	7.29	7.93	7.28	9.07	84	91	84	104
1957	9.15	7.65	8.32	7.36	9.17	84	91	80	100
1958	9.27	7.66	8.33	7.37	9.18	83	90	80	99
1959	9.33	7.48	8.13	7.31	9.10	80	87	78	98
1960	9.43	7.48	8.13	7.32	9.12	79	86	78	97
1961	9.40	7.45	8.10	7.23	9.00	79	86	77	96
Average 1957-61	9.32	7.54	8.20	7.32	9.11	81	88	79	98
1962	9.60	7.40	8.04	7.01	8.73	77	84	73	91
1963	11.94	8.37	9.10	7.38	9.19	70	76	62	77
1964	10.68	8.14	8.85	6.71	8.36	76	83	63	78
1965	10.22	8.00	8.70	6.64	8.27	78	85	65	81
1966	10.36	8.16	8.87	6.70	8.34	79	86	65	81
Average 1962-66	10.56	8.01	8.71	6.89	8.58	76	82	65	81
1967									
	10.62	8.37	9.10	6.75	8.40	79	86	64	79
1968	10.84	8.53	9.27	6.31	7.85	79	86	58	72
1969	11.44	8.98	9.77	6.26	7.80	78	85	55	68
1970	11.97	9.38	10.20	6.79	8.46	78	85	57	71
1971	12.48	9.85	10.71	7.04 ^{2/}	8.77	79	86	56	70
Average 1967-71	11.47	9.02	9.81	6.63	8.26	79	86	58	72
1971									
May	12.40	9.91	10.77	7.37	9.18	80	87	59	74
June	12.55	9.91	10.77	7.37	9.18	79	86	59	73
July	12.60	9.91	10.77	7.37	9.18	79	85	58	73
August	12.60	9.91	10.77	7.37	9.18	79	85	58	73
September	12.60	9.91	10.77	7.37	9.18	79	85	58	73
October	12.60	9.91	10.77	7.37	9.18	79	85	58	73
November	12.60	9.91	10.77	7.37	9.18	79	85	58	73
December	12.60	9.91	10.77	3.68 ^{5/}	4.58	79	85	29	36
1972									
January	12.81	9.80	10.65	4.15	5.17	77	83	32	40
February	13.00	9.20	10.00	4.15	5.17	71	77	32	40
March	13.00	9.20	10.00	4.15	5.17	71	77	32	40
April	13.20	9.23	10.03	4.15	5.17	70	76	31	39
Last 12-month average	12.71	9.73	10.57	5.99	7.46	77	83	47	59

1/ Gross basis price in 100-pound bags subject to a 2 percent cash discount.

2/ Hydrate, commercial bags less than carlots, ex whse., N.Y., N.Y. Beginning April 1964, price is for 600 bag carload f.o.b. N.Y.

3/ For regular conversion sirup (38-49 D.E.) in tanks New York, N.Y., except prior to April 1964 price quotation is for corn sirup in drums. Quoted as 43° Baume unmixed, except prior to March 1956 quotation is for 40° Baume unmixed.

4/ Assumes price is for 92 percent solids for dextrose and 80.3 percent solids for corn sirup. Thus dry basis price is quoted price divided by 0.92 for dextrose and 0.803 for corn sirup.

5/ Quoted price for corn sirup revised December 1971 and Jan.-March, 1972



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HIGHLIGHTS

OF STATISTICAL SERIES IN THIS ISSUE

1. April 1972 sugar deliveries for continental U. S. consumption 813,000 short tons, raw value (preliminary) down about 236,000 tons from March 1972 and down 47,000 tons from April 1971. January-April 1972 deliveries 3,391,000 short tons, raw value up 100,000 tons from January-April 1971. Final data for March 1972 deliveries 1,049,000 short tons, raw value - previously published preliminary as 1,007,000 tons.
2. Primary distributors' stocks Apr. 29, 1972 were 2,847,000 short tons, raw value (preliminary) up 188,000 tons from a year-ago and down 51,000 tons from March 1972. During April refiners' stocks increased 98,000 tons, beet processors' stocks decreased 91,000 tons, mainland cane processors' stocks decreased by 57,000 tons and importers of direct consumption sugar stocks were about unchanged.
3. Charges to quotas January 1 to April 30, 1972 were 3,918,003 short tons, raw value, leaving a balance of 8,081,997 tons to be supplied within the 12,000,000 ton total.
4. Regionally, January-March deliveries, 1972 as compared to 1971 were up in all of the 5 regions: Increases -- West, 7.2 percent North Central 6.1 percent, South 5.2 percent, mid-Atlantic 3.9 percent and New England 3.8 percent.
5. Through May 6, 1972, imports of sweetened chocolate (for consumption at retail), candy and confectionery totaled 48.3 million pounds or about 39.5 percent of the nine month quota through September 30 and about 27.6 percent of the 1972 calendar year quota.